

HealthShare Referral Manager

Community Provider User Guide

Department of Veterans Affairs
Office of Information and Technology

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Table of Contents

1. Introduction	8
1.1. Project and Solution Overview	8
1.2. User Guide Overview	8
2. HSRM Lifecycle	9
3. Accessing HSRM	9
3.1. Getting Access to HSRM	9
4. Working in HSRM.....	10
4.1. Locate a Referral	10
4.1.1. Column Header Sort.....	10
4.1.2. Advanced Sort.....	11
4.2. Manually Change the Status of a Referral	12
4.3. Access Standardized Episode of Care Information	13
4.4. Print the Offline Referral Form	14
4.4.1. Individual Referral.....	14
4.4.2. Multiple Referrals	16
4.5. Manage Documents	17
4.5.1. View and Download Documents	17
4.5.2. Add Documents.....	18
4.6. Record an Appointment.....	19
4.6.1. Locate a Provider Using the PPMS Search	21
4.6.2. Locate a Provider Using Provider Search and Additional Details.....	22
4.7. Cancel an Appointment or Mark an Appointment as a No Show	24
4.8. Record Contact	26
4.9. View Additional Referral Information.....	27
4.10. Working with Tasks	28
4.10.1. Create a Task.....	29
4.10.2. View or Edit a Task	30
4.10.3. Mark a Task Complete	32
4.11. Canned Text.....	33
4.12. Generate Reports	34
4.13. Billing and Other Referral Information.....	35
5. Additional Resources	37
Appendix A: Acronyms and Abbreviations.....	38

Table of Figures

Figure 1: HSRM Referral Lifecycle.....	9
Figure 2: Referral List	11
Figure 3: Referral List – Advanced Sort	11
Figure 4: Sorting Options.....	12
Figure 5: Referral Details – Status Field.....	13
Figure 6: Referral Details – SEOC Details	14
Figure 7: SEOC Details Screen	14
Figure 8: Component Menu – Offline Referral Form.....	15
Figure 9: Offline Referral Form	15
Figure 10: Referral List – Multiple Referrals	16
Figure 11: Component Menu – Selected Offline Referral Forms	16
Figure 12: Multiple Offline Referral Form.....	17
Figure 13: Referral Details – Add Documents to a Referral.....	18
Figure 14: Add Documents Screen.....	19
Figure 15: Referral Details – Record Appointment	20
Figure 16: Record Appointment Screen	20
Figure 17: Record Appointment Screen – PPMS Provider Search.....	21
Figure 18: PPMS Provider Search Screen.....	22
Figure 19: Provider Search Screen.....	22
Figure 20: Record Appointment Screen	23
Figure 21: Action Menu - Additional Referral Information	24
Figure 22: Additional Referral Information Screen	25
Figure 23: Appointment Change Status Screen	26
Figure 24: Additional Referral Information Screen	26
Figure 25: Action Menu - Record Contact.....	27
Figure 26: Record Contact - Record Contact Screen	27
Figure 27: Referral List - Additional Referral Information.....	28
Figure 28: Additional Referral Information.....	28
Figure 29: Action Menu - Edit Task.....	29
Figure 30: Task Edit Screen.....	30
Figure 31: Menu - Task List	30
Figure 32: Task List Screen.....	31
Figure 33: Task Edit Screen.....	31
Figure 34: Task List	32

Figure 35: Referral Details Screen	32
Figure 36: Menu - Task List	33
Figure 37: Task List Screen.....	33
Figure 38: Menu - Community Provider Referral Summary Report.....	35
Figure 39: Community Provider Referral Summary Report Parameters	35
Figure 40: Component Menu - Billing and Other Referral Information	36
Figure 41: Component Menu - Billing and Other Referral Information Sheet.....	37

Table of Tables

Table 1: HSRM Report Types	34
Table 2: Acronyms and Abbreviations	38

1. Introduction

1.1. Project and Solution Overview

HealthShare Referral Manager (HSRM) is an enterprise-wide system in support of community care used by community care staff to generate referrals and authorizations for Veterans receiving care in the community. Clinical and Department of Veterans Affairs (VA) community care staff located at VA medical centers (VAMCs), outpatient clinics, community-based outpatient clinics (CBOCs), and Veterans Integrated Service Network (VISN) offices use this solution to enhance Veteran access to care. HSRM is an integral component of the community care information technology (IT) architecture that allows Veterans to receive care from community providers.

HSRM allows VA to transition from what is currently a largely manual process to a more streamlined process that generates standardized referrals and authorizations according to clinical and business rules.

HSRM supports clinical and administrative processes expected to:


- Seamlessly provide eligible Veterans with prompt referrals to a community provider of their choice.
- Provide community providers with referrals and authorizations consistent with industry standards.
- Decrease the administrative burden on VA clinical and community care staff members by establishing clinical and business pathways that reflect best practices, consistent outcomes, and reduced turnaround times, along with a solution that automates those pathways.
- Facilitate communication between community care staff, community providers, and third-party administrators (TPAs) via a unified platform that enables the secure exchange of medical information.

HSRM allows VA and community providers to better manage community care referrals and authorizations, resulting in simpler processing for VA and community providers as well as enhanced patient experience for Veterans.

1.2. User Guide Overview

Community providers play a key role in delivering high-quality care to Veterans in their communities. HSRM enables community providers to receive and process referrals from VA and share information faster and more accurately than ever before. Community providers, VA, and Veterans all benefit from this new system. This user guide provides details about the

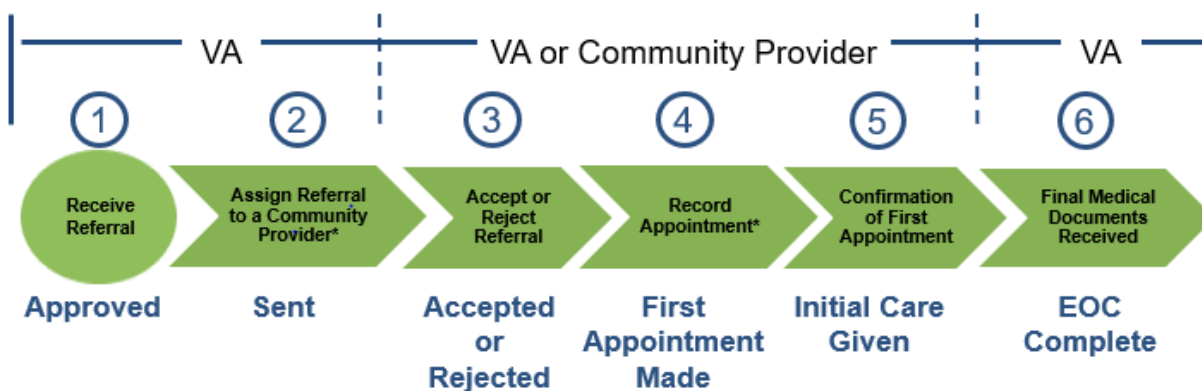
community provider's role in processing referrals in HSRM and how to maximize system functionality.

 **NOTE:** HSRM will be down for routine maintenance on the third Tuesday of every month from midnight to 4:00 a.m. During this time, you will be unable to access the system.

2. HSRM Lifecycle

A referral's lifecycle begins when the referral is received in HSRM, and it ends when the Episode of Care (EOC) is complete and all medical documentation has been received. There are six steps in the lifecycle. Community providers complete steps 3, 4, and 5, as shown in the referral lifecycle diagram.

Figure 1: HSRM Referral Lifecycle



3. Accessing HSRM


3.1. Getting Access to HSRM

A HealthShare Referral Manager account is needed for staff who typically process referrals, accept and reject referrals, record appointments, and share medical documentation with VA.

In order to be eligible to be an HSRM user, your facility must:

1. Have an active partnering agreement with one or more VA Medical Center.
2. Reach out to the VA Medical Center(s) you partner with to let them know of your interest in HSRM and determine the best timing for your deployment.

If your facility meets these requirements, you may proceed with HSRM registration. Follow the steps below to sign up for HSRM.

 **NOTE:** Links to all documents are on the [Office of Community Care webpage](#).

1. Attend a two-hour training webinar on VHA TRAIN (https://www.train.org/vha/course/1082953/live_event) or refer to this guide to learn how to use HSRM.
2. Use the *ID.me User Guide* to sign up for an ID.me account at <https://www.id.me>.
3. One team member from your organization will fill out the *End-User Tracker* with all the names and email addresses of end users requiring access to HSRM. Please ensure the email addresses listed match those used for each respective user's ID.me account.
4. One team member from your organization will then submit the *End User Tracker* to the HSRM Help Desk at HSRMsupport@va.gov.
5. The HSRM Help Desk will send that team member the login information for their staff.

4. Working in HSRM

4.1. Locate a Referral



HSRM allows community providers to locate referrals more quickly and manage them according to their priority. When logging into the system, the **Referral List** screen—which is also the home screen—appears. The **Referral List** screen features what is, in effect, a user to-do list; it shows all of the referrals from VA in a central location and allows referrals to be sorted.

All lists in HSRM can be sorted by column heading. The default view lists referrals by highest priority and date added, making it easy to see which referrals need immediate attention. The **Referral List** may also be sorted by the user.

4.1.1. Column Header Sort

Sorting the **Referral List** allows users to view the information in any column in ascending or descending order.

To locate a referral by sorting column headers:

1. Navigate to the **Referral List** by clicking either the **Home** icon  or the **Menu** icon  at the top left of the screen, then selecting **Referral List** on the menu.
2. Click on a column heading to sort data in ascending order by that category. Click it a second time to sort in descending order. Click it a third time to sort by the default, **Priority Order** and **Date Added**.



NOTE: The blue hyperlink at the top right will update based on the sort.

3. Click on the row of the relevant referral to access the **Referral Details** screen.

Figure 2: Referral List

HealthShare Referral Manager QA R23_USXX_ADHOC3_B103												
Referral List												
Priority Order, Date Added												
Referrals												
Referring Facility	Last Name	First Name	Date of Birth	SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care	Status	Community Provider / Facility
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Hematology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000718	HEMATOLOGY	First Appointment Made	ACUTE & WELLNESS CHIROPRACTIC CLINIC
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Newborn Care SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000712	NEWBORN CARE	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Lab and Pathology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000719	LAB AND PATHOLOGY	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Emergency/Urgent Care SEOC 1.0.2 PRCT	Routine		03/07/2019	VA0000000804	ER VISIT/URGENT CARE	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Allergy and Immunology SEOC 1.0.3 PRCT	Routine		05/31/2019	VA0000001171	ALLERGY AND IMMUNOLOGY	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC
Canandaigua VA Medical Center	THREE	Veteran	01/01/1900	666010003	Cardiology - CathPCI SEOC 1.0.4	Routine		05/31/2019	VA0000001173	CARDIOLOGY TESTS, PROCEDURES, STUDIES	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC

4.1.2 Advanced Sort

The **Advanced Sort** feature provides multiple criteria by which users can sort any **Referral List** in HSRM.

To locate a referral by using the **Advanced Sort** feature:



1. Navigate to the **Referral List** by clicking either the **Home** icon  or the **Menu** icon  at the top left of the screen, then selecting **Referral List** on the menu.
2. Click the blue hyperlink at the top right corner of the **Referral List** to activate **Advanced Sort**.

Figure 3: Referral List – Advanced Sort

HealthShare Referral Manager QA R23_USXX_ADHOC3_B103												
Referral List												
Priority Order, Date Added												
Referrals												
Referring Facility	Last Name	First Name	Date of Birth	SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care	Status	Community Provider / Facility
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Hematology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000718	HEMATOLOGY	First Appointment Made	ACUTE & WELLNESS CHIROPRACTIC CLINIC
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Newborn Care SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000712	NEWBORN CARE	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Lab and Pathology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000719	LAB AND PATHOLOGY	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Emergency/Urgent Care SEOC 1.0.2 PRCT	Routine		03/07/2019	VA0000000804	ER VISIT/URGENT CARE	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Allergy and Immunology SEOC 1.0.3 PRCT	Routine		05/31/2019	VA0000001171	ALLERGY AND IMMUNOLOGY	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC
Canandaigua VA Medical Center	THREE	Veteran	01/01/1900	666010003	Cardiology - CathPCI SEOC 1.0.4	Routine		05/31/2019	VA0000001173	CARDIOLOGY TESTS, PROCEDURES, STUDIES	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC



3. The available options appear. Both primary and secondary sort criteria can be selected. Click the **Ascending**  or **Descending**  icon associated with the specific criterion for the sort. In the case shown below, **Last Name** and **Date of Birth** have been selected in ascending order. The referrals are now sorted according to the sort criteria. Click on the row of the relevant referral to view the **Referral Details** screen.

Figure 4: Sorting Options

HealthShare Referral Manager QA R23_USXX_ADHOC3_B103										
Referral List										
> Referrals										
Referring Facility	Last Name	First Name	Date of Birth	SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Hematology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000718	HEMATOLOGY
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Newborn Care SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000712	NEWBORN CARE
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Lab and Pathology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000719	LAB AND PATHOLOGY
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Emergency/Urgent Care SEOC 1.0.2 PRCT	Routine		03/07/2019	VA0000000804	ER VISIT/URGENT CA
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Allergy and Immunology SEOC 1.0.3 PRCT	Routine		05/31/2019	VA0000001171	ALLERGY AND IMMUNOLOGY
Canandaigua VA Medical Center	THREE	Veteran	01/01/1900	666010003	Cardiology - Cath/PCI SEOC 1.0.4	Routine		05/31/2019	VA0000001173	CARDIOLOGY TESTS, PROCEDURES, STUD


Sorting Options

- Priority Order
- Date Added
- Date of Birth
- Community Provider / Facility
- Category of Care
- Last Name
- First Name
- SSN
- Priority
- Referring Facility
- Service
- Status
- Referral Number
- Secondary Sort
 - Priority Order
 - Date Added
 - Date of Birth
 - Community Provider / Facility
 - Category of Care

4.2. Manually Change the Status of a Referral

The **Referral Status** shows where a referral is in its lifecycle. As shown in [Figure 1](#), the possible statuses are: **Approved**, **Sent**, **Accepted**, **Rejected**, **First Appointment Made**, **Initial Care Given**, and **EOC Complete**. Community providers should only use **Accepted**, **Rejected**, **First Appointment Made**, and **Initial Care Given**.



To manually update the status of a referral:

1. Locate the referral (see the [Locate a Referral](#) section of this guide).
2. Navigate to the **Referral Details** screen by clicking on the referral row.
3. Navigate to the **Referral Processing Information** section on the **Referral Details** screen. Click the **Magnifying Glass** icon  and select the new status. Community providers can change the referral status to **Accepted**, **Rejected**, **First Appointment Made** (status automatically changes to **First Appointment Made** when an initial appointment is recorded), or **Initial Care Given**, depending on where the referral is in its lifecycle.



NOTE: If the **Rejected** status is selected, the **Referral Reason** field will be mandatory.

Figure 5: Referral Details – Status Field

4. Enter any relevant comments regarding the referral in the **Comments** field of the **Referral Processing Information** section.
5. Click the **Update** button  at the bottom right of the screen to save changes and return to the previous screen. Click the **Apply** button  to save changes and stay on the same screen.

4.3. Access Standardized Episode of Care Information

A Standardized Episode of Care (SEOC) is a bundle of services that has been authorized under a single referral. All clinically related services for one patient for a discrete diagnostic condition within a specific period across a continuum of care are included in a SEOC. A SEOC helps reduce the need to seek individual authorization for each element of care. It includes all physician, inpatient, and outpatient care as well as labs and diagnostics. Within HSRM, the user can view a list of services associated with the SEOC. This is the procedural overview of services.

To view SEOC details:

1. Locate the referral (see the [Locate a Referral](#) section of this guide).
2. Click on the row of the referral to navigate to the **Referral Details** screen.
3. Navigate to the **Service Requested** section on the **Referral Details** screen and click on the **SEOC Details** link.



NOTE: VA is required by law to obtain precertification and bill third-party payers for care that is not related to a Veteran's service or special authority for Veterans who have other health insurance (OHI). Precertification information and instructions can be found under the **SEOC Details** link and in the **Offline Referral Form**.

Figure 6: Referral Details – SEOC Details

HealthShare Referral Manager QA R24_USXX_ADHOC1

ONE, Veteran 01/01/1900 119 Yrs Male 515 Alpha St DAYTON, OH 45404

Referral Details

*Referring Facility Canandaigua VA Medical Center
 Referring Facility Phone 585-394-2000
 Referring Facility Fax 585-393-8328
 *Referring Provider THAO TRAN NPI: 4433224183
 *Priority Routine

*Provisional Diagnosis H918X9 Other specified hearing loss, unspecified ear
 *Referral Date 05/31/2019
 Clinically Indicated Date 05/31/2019
 Referral Expiration Date 06/12/2020

Level of Care Coordination Basic
[Add/View Documents](#)

Service/s Requested

Category of Care ALLERGY AND IMMUNOLOGY
 *Service Requested Allergy and Immunology SEOC 1.0.3 PRCT
[SEOC Details](#)

This referral is only valid for the services authorized under this standardized episode of care (SEOC). An overview of services and number of visits authorized for this SEOC can be viewed using the "SEOC Details" link above.

For additional billing and referral information, please click the "Billing and Other Referral Information" tab underneath the "Print" tab on the vertical ellipse action menu in the top right corner of this screen.

If additional services are needed, or for questions related to this referral, please contact the referring VA facility listed above.

Pre-certification: The Department of Veterans Affairs (VA) is required by law to obtain pre-certification and bill Third Party Payers for care that is not related to a Veteran's Service Connection or Special Authority for Veterans that have Other Health Insurance (OHI). The Veterans Health Administration (VHA) Office of Community Care (OCC) Standardized Episode Of Care (SEOC) referral you have accepted may include specific services that require Third Party Payer pre-certification. It is imperative that you notify the VA if you have scheduled any of these specific services for a Veteran that has OHI, so that VA can notify the Third Party Payer. Notification details and specific care requiring pre-certification for this SEOC can be found at: https://www.va.gov/communitycare/providers/precert_requirements.asp

Apply Update

4. Review the **Procedural Overview** for the SEOC.

Figure 7: SEOC Details Screen

HealthShare Referral Manager QA R23_USXX_ADHOC3_B103

ONE, Veteran 01/01/1900 119 Yrs Male 515 Alpha St DAYTON, OH 45404

Procedural Overview

Allergy and Immunology SEOC 1.0.3 PRCT

SEOC Service	Quantity Limit
Initial outpatient evaluation and treatment for the referred condition indicated on the consult-ALLERGY AND IMMUNOLOGY-1.0.3	999
Labs (including RAST testing) and pathology relevant to the referred condition on the consult-ALLERGY AND IMMUNOLOGY-1.0.3	999
Diagnostic imaging relevant to the referred condition on the consult-ALLERGY AND IMMUNOLOGY-1.0.3	999
Procedures/diagnostic studies relevant to the referred condition including but not limited to: allergen skin testing, drug testing, chemical patch testing, methacholine challenge, PFT-ALLERGY AND IMMUNOLOGY-1.0.3	999
Standard immunotherapy and RUSH immunotherapy, including Nurse Visits-ALLERGY AND IMMUNOLOGY-1.0.3	999
Creation of serum for injections-ALLERGY AND IMMUNOLOGY-1.0.3	999
Infusion therapy, in clinic, to include IV Fluids during infusion as relevant to the referred condition on the consult-ALLERGY AND IMMUNOLOGY-1.0.3	999
Follow up Visits for this Episode of Care Relevant to the Referred Condition on the consult-ALLERGY AND IMMUNOLOGY-1.0.3	999
Follow Up Biopsy if Clinically Indicated-ALLERGY AND IMMUNOLOGY-1.0.3	999
Desensitization (Antibiotics and Chemotherapeutic Agents)-ALLERGY AND IMMUNOLOGY-1.0.3	999
Inpatient Admission or Observation admission as related to referred condition on the consult -ALLERGY AND IMMUNOLOGY-1.0.3	999

4.4. Print the Offline Referral Form

Printing the **Offline Referral Form** enables community providers to retain a hard copy of the referral for their files. The **Offline Referral Form** contains referral details, additional referral information, billing and precertification information, patient details, and SEOC information. Community providers can print offline referral forms for individual or multiple referrals.

4.4.1. Individual Referral

To print the **Offline Referral Form** for an individual referral:


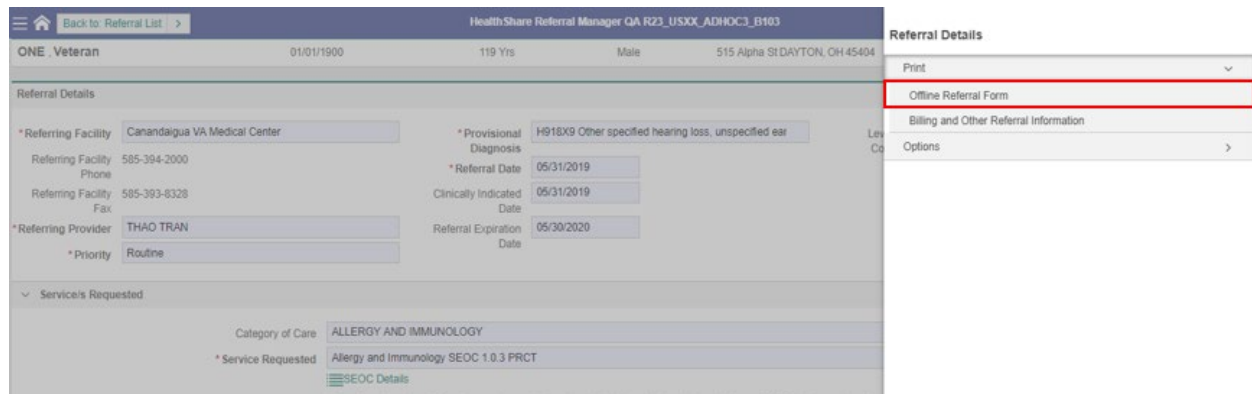
1. Locate the referral (see the [Locate a Referral](#) section of this guide).
2. Click on the row of the referral to navigate to the **Referral Details** screen.
3. Click the **Component Menu** icon  at the far right of the **Referral Details** (below the **Patient Banner**), then select **Offline Referral Form** from the **Print** drop-down menu.

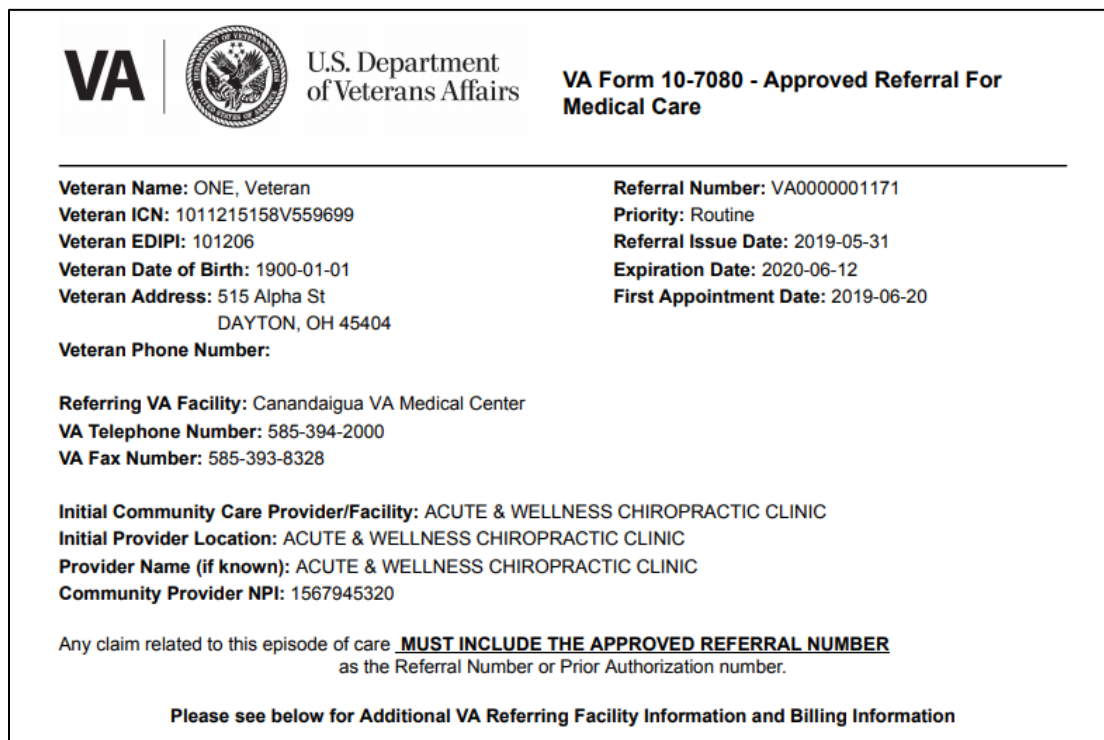
Figure 8: Component Menu – Offline Referral Form



The screenshot shows the 'Referral Details' screen in the HealthShare Referral Manager. The patient information at the top includes: ONE, Veteran; 01/01/1900; 119 Yrs; Male; 515 Alpha St DAYTON, OH 45404. The 'Referral Details' section includes fields for Referring Facility (Canandaigua VA Medical Center), Referring Facility Phone (585-394-2000), Referring Facility Fax (585-393-8328), Referring Provider (THAO TRAN), and Priority (Routine). The 'Provisional Diagnosis' is H91BX9 Other specified hearing loss, unspecified ear. The 'Referral Date' is 05/31/2019, the 'Clinically Indicated Date' is 05/31/2019, and the 'Referral Expiration Date' is 05/30/2020. The 'Service's Requested' section shows 'Category of Care' as ALLERGY AND IMMUNOLOGY and 'Service Requested' as Allergy and Immunology SEOC 1.0.3 PRCT. On the right, the 'Referral Details' dropdown menu is open, showing options: Print, Offline Referral Form (highlighted with a red box), Billing and Other Referral Information, and Options.

4. The **Offline Referral Form** appears in a new browser tab and can be printed, downloaded, and saved.

Figure 9: Offline Referral Form



The screenshot shows the VA Form 10-7080 - Approved Referral For Medical Care. The form includes the VA logo and the U.S. Department of Veterans Affairs seal. The form is titled 'VA Form 10-7080 - Approved Referral For Medical Care'. The form contains the following information:

Veteran Name: ONE, Veteran
Veteran ICN: 1011215158V559699
Veteran EDIPI: 101206
Veteran Date of Birth: 1900-01-01
Veteran Address: 515 Alpha St
 DAYTON, OH 45404
Veteran Phone Number:

Referring VA Facility: Canandaigua VA Medical Center
VA Telephone Number: 585-394-2000
VA Fax Number: 585-393-8328

Initial Community Care Provider/Facility: ACUTE & WELLNESS CHIROPRACTIC CLINIC
Initial Provider Location: ACUTE & WELLNESS CHIROPRACTIC CLINIC
Provider Name (if known): ACUTE & WELLNESS CHIROPRACTIC CLINIC
Community Provider NPI: 1567945320

Referral Number: VA0000001171
Priority: Routine
Referral Issue Date: 2019-05-31
Expiration Date: 2020-06-12
First Appointment Date: 2019-06-20

Any claim related to this episode of care **MUST INCLUDE THE APPROVED REFERRAL NUMBER** as the Referral Number or Prior Authorization number.



Please see below for Additional VA Referring Facility Information and Billing Information



NOTE: If you are using Chrome as your browser, you will need to download and save the form to your computer. If you are using Internet Explorer as your browser, use the **Save and Copy** feature to save to your computer.

4.4.2. Multiple Referrals

To generate an **Offline Referral Form** for multiple referrals:

1. Navigate to the **Referral List** by clicking either the **Home** icon  or the **Menu** icon  at the top left of the screen, then selecting **Referral List** on the menu.



NOTE: Generating an **Offline Referral Form** for multiple referrals may be done from any referral list, including the veteran's **Referral List**.


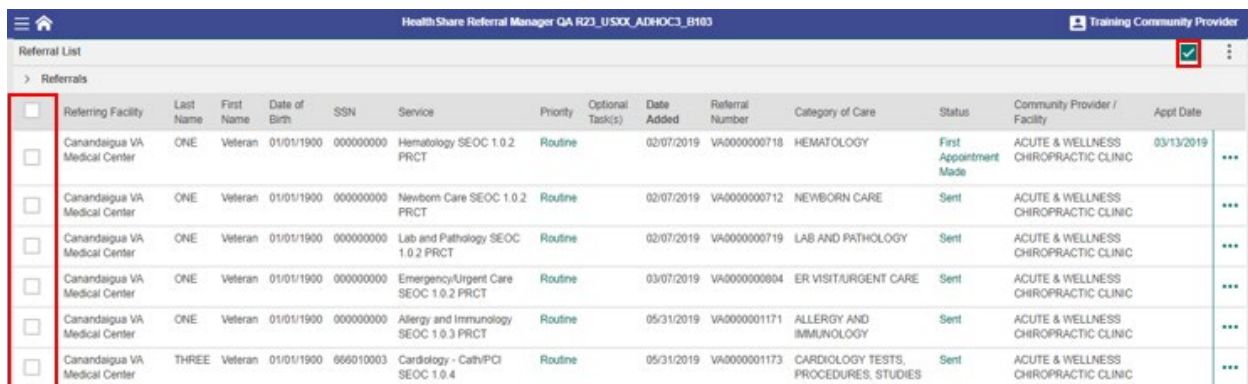
2. Click the **Toggle Multiple Selections** checkbox  at the top right to enable the selection of multiple referrals, then click the checkboxes next to the appropriate referrals.

Figure 10: Referral List – Multiple Referrals



Referring Facility	Last Name	First Name	Date of Birth	SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care	Status	Community Provider / Facility	Appt Date
<input type="checkbox"/>	Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Hematology SEOC 1.0.2 PRCT	Routine	02/07/2019	VA0000000718	HEMATOLOGY	First Appointment Made	ACUTE & WELLNESS CHIROPRACTIC CLINIC	03/13/2019
<input type="checkbox"/>	Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Newborn Care SEOC 1.0.2 PRCT	Routine	02/07/2019	VA0000000712	NEWBORN CARE	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
<input type="checkbox"/>	Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Lab and Pathology SEOC 1.0.2 PRCT	Routine	02/07/2019	VA0000000719	LAB AND PATHOLOGY	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
<input type="checkbox"/>	Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Emergency/Urgent Care SEOC 1.0.2 PRCT	Routine	03/07/2019	VA0000000804	ER VISIT/URGENT CARE	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
<input type="checkbox"/>	Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Allergy and Immunology SEOC 1.0.3 PRCT	Routine	05/31/2019	VA0000001171	ALLERGY AND IMMUNOLOGY	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
<input type="checkbox"/>	Canandaigua VA Medical Center	THREE	Veteran	01/01/1900	666010003	Cardiology - Cath/PCI SEOC 1.0.4	Routine	05/31/2019	VA0000001173	CARDIOLOGY TESTS, PROCEDURES, STUDIES	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	



3. Click the **Component Menu** icon  and select **Offline Referral Form** from the **Print** drop-down menu.

Figure 11: Component Menu – Selected Offline Referral Forms



Referring Facility	Last Name	First Name	Date of Birth	SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care
<input checked="" type="checkbox"/>	Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Hematology SEOC 1.0.2 PRCT	Routine	02/07/2019	VA0000000718	HEMATOLOGY
<input checked="" type="checkbox"/>	Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Newborn Care SEOC 1.0.2 PRCT	Routine	02/07/2019	VA0000000712	NEWBORN CARE
<input checked="" type="checkbox"/>	Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Lab and Pathology SEOC 1.0.2 PRCT	Routine	02/07/2019	VA0000000719	LAB AND PATHOLOGY
<input checked="" type="checkbox"/>	Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Emergency/Urgent Care SEOC 1.0.2 PRCT	Routine	03/07/2019	VA0000000804	ER VISIT/URGENT CARE
<input checked="" type="checkbox"/>	Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Allergy and Immunology SEOC 1.0.3 PRCT	Routine	05/31/2019	VA0000001171	ALLERGY AND IMMUNOLOGY
<input checked="" type="checkbox"/>	Canandaigua VA Medical Center	THREE	Veteran	01/01/1900	666010003	Cardiology - Cath/PCI SEOC 1.0.4	Routine	05/31/2019	VA0000001173	CARDIOLOGY TESTS, PROCEDURES, STUDIES

4. The **Offline Referral Form** appears in a new browser tab.

Figure 12: Multiple Offline Referral Form

Veteran Approved Referrals for Medical Care Cover Page					
Veteran Name	Referral No	Referral Date	VA Facility	Category of Care	Community Provider/Facility
ONE, Veteran	VA0000000719	2019-02-07	Canandaigua VA Medical Center	LAB AND PATHOLOGY	ACUTE & WELLNESS CHIROPRACTIC CLINIC
ONE, Veteran	VA0000000801	2019-03-07	Canandaigua VA Medical Center	CARDIOLOGY IMAGING	ACUTE & WELLNESS CHIROPRACTIC CLINIC
ONE, Veteran	VA0000000804	2019-03-01	Canandaigua VA Medical Center	ER VISIT/URGENT CARE	ACUTE & WELLNESS CHIROPRACTIC CLINIC



NOTE: Compiled **Offline Referral Forms** contain a cover page. The **Offline Referral Form** can be downloaded and saved.

4.5. Manage Documents

HSRM allows VA and community providers to easily upload and download medical documents such as medical records and images. Prior to providing care to a Veteran, community providers can download and review documents that VA shares regarding the Veteran/patient. Following care, community providers upload relevant patient care documentation for VA's review. This eliminates faxing and emailing documentation and greatly enhances the accuracy of patient documentation. HSRM accepts most file types, including JPG, BMP, PNG, Microsoft Office, and PDF. JPG and PDF files display in the preview section. There are no limitations on file size.

4.5.1. View and Download Documents

To view and download documents:

1. Locate the referral (see the [Locate a Referral](#) section of this guide).
2. Navigate to the **Referral Details** screen by clicking on the referral row.
3. Click **Add/View Documents** on the **Referral Details** screen to open the **Documents** screen. Here all documents that have been added to the referral can be viewed.




NOTE: Documents may also be viewed and downloaded by accessing **Documents** from the **Additional Referral Information** screen. These instructions are included in the [Figure 24: Additional Referral Information](#) section of this guide.

4.5.2. Add Documents

To add documents to a referral:

1. Locate the referral (see the [Locate a Referral](#) section of this guide).
2. Navigate to the **Referral Details** screen by clicking on the referral row.
3. Click **Add/View Documents** on the **Referral Details** screen to open the **Documents** screen.

Figure 13: Referral Details – Add Documents to a Referral

4. Click the **New** button  at the bottom right of the **Documents** screen. The **Add Document** screen appears.
5. Enter data in the corresponding fields on the **Add Document** screen.



NOTE: The **Date Created**, **Time Created**, and **User Created** fields are populated automatically and are read-only.

Figure 14: Add Documents Screen

HealthShare Referral Manager QA R21_USXX_ADHOC2_B52 Training Community Provider

ONE, Veteran 01/01/1900 119 Yrs Male 000 MAPLE LANE

Add Document

Date Created 03/14/2019

Time Created 20:18

User Created Training Community Provider

*Description CT scan




*Document Type Medical Documents

Attach File

Upload

HealthShare Referral Manager

Update

6. Click the **Upload** button  and select the file from the computer's hard drive.
7. To identify the type of document, click the **Magnifying Glass** icon  in the **Document Type** field and choose the appropriate type (either **Medical Documents** or **Request for Services/SAR**). This will trigger an automatic task for VA to review the document.
8. Click the **Update** button  at the bottom right of the screen to save and go back to the **Documents** screen.
9. Select **Referral Details** from the **Breadcrumb Trail** drop-down list at the top left of the screen to go back to the **Referral Details** screen or continue to add documents in the same manner.


4.6. Record an Appointment

Recording appointments in HSRM makes this information available to VA without having to phone, email, or fax, thus reducing the administrative burden for both VA and community providers. An appointment can be recorded in the system from the **Referral Details** screen.



NOTE: Don't forget to book the appointment in your own external system.

To record an appointment:

1. Locate the referral (see the [Locate a Referral](#) section of this guide).
2. Click on the referral to navigate to the **Referral Details** screen.
3. Click the **Component Menu** icon  located at the far right of the screen in the **Referral Details** section to open the **Component Menu**.

4. Select **Options** and **Record Appointment**.

Figure 15: Referral Details – Record Appointment

HealthShare Referral Manager QA R23_USXX_ADHOC3_B103

ONE, Veteran 01/01/1900 119 Yrs Male 515 Alpha St DAYTON, OH 45404

Referral Details

*Referring Facility Canandaigua VA Medical Center

Referring Facility 565-394-2000

Referring Facility 565-393-8328

*Provisional Diagnosis H918X9 Other specified hearing loss, unspecified ear

*Referral Date 05/31/2019

Clinically Indicated Date 05/31/2019

Referral Details

Print

Offline Referral Form

Billing and Other Referral Information

Options

Record Appointment

5. Enter the appropriate information (e.g., **Service Requested**, **Appointment for**, **Scheduling Method**, **Date/time**).



NOTE: Mandatory fields are marked with a red asterisk.

Figure 16: Record Appointment Screen

HealthShare Referral Manager QA R24_USXX_ADHOC1

ONE, Veteran 01/01/1900 119 Yrs Male 515 Alpha St DAYTON, OH 45404

*Appointment for Initial outpatient evaluation and treatment for the referred condition indicated on the consult-ALLERGY AND IMMUNOLOGY-1.0.3

Scheduling Method Scheduled by Community Provider

*Date 08/22/2019 *Time 14:00

*Treating Specialty Chiropractic

PPMS Provider Search

Provider Search and Additional Details

*Community Provider/Facility ACUTE & WELLNESS CHIROPRACTIC CLINIC

*Appointment Location ACUTE & WELLNESS CHIROPRACTIC CLINIC

Provider Name ACUTE & WELLNESS CHIROPRACTIC CLINIC

Drive Time

Affiliation

Appointment Type

Appointment Duration

Appointment Reason

Notes

HealthShare Referral Manager

Update

6. If the name of the specific facility caregiver is unknown or the appointment is with a facility caregiver other than the initial community provider, you may search for a community provider using two methods: **Provider Profile Management System (PPMS) Provider Search**, which allows users to search by patient address, specialty, or search for all, or the **Provider Search and Additional Details Search**, used when you want to find a provider using parameters such as city/state, National Provider Identifier (NPI), or provider name.

4.6.1. Locate a Provider Using the PPMS Search

A list of providers and their details can be found using the **PPMS Provider Search** feature. The **PPMS Provider Search** allows users to search by patient address, specialty or search for all.

1. On the **Record Appointment** screen, click the **PPMS Provider Search** link.

Figure 17: Record Appointment Screen – PPMS Provider Search

The screenshot displays the 'Record Appointment' screen in the HealthShare Referral Manager. At the top, a header bar shows 'Back to: Referral Details' and 'HealthShare Referral Manager QA R24_USXX_ADHOC1'. Below this, patient information is listed: 'ONE, Veteran', '01/01/1900', '119 Yrs', 'Male', and '515 Alpha ST DAYTON, OH 45404'. The main form area contains several fields: 'Appointment for' (Initial outpatient evaluation and treatment for the referred condition indicated on the consult-ALLERGY AND IMMUNOLOGY-1.0.3), 'Scheduling Method' (Scheduled by Community Provider), 'Date' (08/22/2019), and 'Time' (14:00). The 'Treating Specialty' field is highlighted with a red box and contains the text 'PPMS Provider Search'. Below this, a section titled 'Provider Search and Additional Details' shows a list of providers, with 'ACUTE & WELLNESS CHIROPRACTIC CLINIC' selected. Other fields include 'Community Provider/Facility', 'Appointment Location', 'Provider Name', 'Drive Time', 'Affiliation', 'Appointment Type', 'Appointment Duration', 'Appointment Reason', and 'Notes'. A green 'Update' button is located at the bottom right of the form.

2. Specialties populate from those associated to the SEOC of your referral. Up to four may be selected.
3. **Veteran Address** is populated from the Veteran's address in **HSRM** (received from **Veterans Health Information Systems and Technology Architecture (VistA)**) and locked only on the first search. This may be changed on a subsequent search.
4. **Search All Providers** is read-only on the first search. This can be used on subsequent searches to expand the radius and drive time to find more providers.
5. Click the **Find** button to connect directly to **PPMS** to find providers within a certain driving distance (calculated in the background).

Figure 18: PPMS Provider Search Screen

PPMS Provider Search

Choose up to four specialties to find providers.

Specialties

Veteran Address

Search All Providers ☐

Specialty	Care Provider	Affiliation	Phone	Email	Care Site	Address	Drive Time	Distance
-----------	---------------	-------------	-------	-------	-----------	---------	------------	----------

HealthShare Referral Manager

Find

6. Select the appropriate provider.

4.6.2. Locate a Provider Using Provider Search and Additional Details

1. On the **Record Appointment** screen, click the **Provider Search** and **Additional Details** link. The **Provider Search** screen appears.

Figure 19: Provider Search Screen

HealthShare Referral Manager QA R23_U150K_ACHOC3_B103

Training Community Provider

Provider Search

To search for a provider, enter at least one of the fields: Specialty, NPI, Last Name, or Community Provider/Facility.

Specialty

Community Provider/Facility

State

City

Affiliation

NPI

First Name

Last Name

Specialty	Facility	Care Site	Care Provider	Address	City	State	ZIP Code	Telephone	Email	Fax Number	Preferred Method for Receiving Referral
Chiropractic	ACUTE & WELLNESS CHIROPRACTIC CLINIC (FA)	ACUTE & WELLNESS CHIROPRACTIC CLINIC	ACUTE & WELLNESS CHIROPRACTIC CLINIC (VCA,CCN1,JA)	123 Main St.	TROY	Ohio	45373				

HealthShare Referral Manager

Find

2. Populate the **Specialty** field on the **Provider Search** screen and click the **Find** button at the bottom right.



NOTE: Community Provider/Facility, State, City, Affiliation, National Provider Identifier (NPI), First Name, and Last Name fields may also be populated. Either a **Specialty** or **NPI** must be provided.

3. Select a provider for the referral by clicking on the row of the provider. The **Record Appointment** screen appears.




NOTE: Affiliation, Appointment Type, Appointment Duration, Appointment Reason, and Notes fields are optional. However, entering information in these fields is a best practice, as it ensures that VA and the community provider have access to all relevant appointment information in a central location.

Figure 20: Record Appointment Screen

4. The **Provider Name** field populates.



NOTE: For subsequent appointments, the name of the previous caregiver will appear in that field and will need to be changed if the new caregiver is different.

5. Click the **Update** button  on the **Record Appointment** screen to save the appointment information. The **Referral Details** screen appears and the status of the referral will automatically change to **First Appointment Made**.



NOTE: If an appointment is recorded for a provider other than the initial community provider, that second provider will not see the referral on their referral list but will instead receive a task on his/her facility's Task List that will allow them to work with the referral.




NOTE: The first appointment made in the SEOC will be on the Referral List for the duration of the referral, regardless of subsequent appointments that are scheduled and

occur. The date of the first appointment made also displays in the **Appointment Date** field in the **Initial Community Provider/Facility Information** section on the **Referral Details** screen.

4.7. Cancel an Appointment or Mark an Appointment as a No Show

To cancel an appointment:

1. Locate the referral (see the [Locate a Referral](#) section of this guide).
2. Click the **Action Menu** icon  to the right of the corresponding referral row and select **Additional Referral Information**.




NOTE: The **Action Menu** icon  is also available from the **Referral Details** screen in the **Patient Banner**.

Figure 21: Action Menu - Additional Referral Information

HealthShare Referral Manager QA R23_USXX_ADR0C4_0108										
Referral List										
Referrals										
Referring Facility	Last Name	First Name	Date of Birth	SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Hematology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000718	HEMATOLOGY
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Newborn Care SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000712	NEWBORN CARE
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Lab and Pathology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000719	LAB AND PATHOLOGY
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Emergency/Urgent Care SEOC 1.0.2 PRCT	Routine		03/07/2019	VA0000000804	ER VISIT/URGENT CARE
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Allergy and Immunology SEOC 1.0.3 PRCT	Routine		05/31/2019	VA0000001171	ALLERGY AND IMMUNOLOGY
Canandaigua VA Medical Center	THREE	Veteran	01/01/1900	666010003	Cardiology - CathPCI SEOC 1.0.4	Routine		05/31/2019	VA0000001173	CARDIOLOGY TESTS, PROCEDURES, STUDIES

Add Task
Patient Details
Additional Referral Information
Record Contact
Requests for Services

3. Locate the appointment from the **Appointments** section and click the **Status** link. The **Appointment Change Status** screen appears.

Figure 22: Additional Referral Information Screen

<div> Back to: Referral Details </div> <div> HealthShare Referral Manager QA R23_US3X_ADHOC3_B103 </div> <div> Training Community Provider </div>									
<div> ONE Veteran 01/01/1900 119 Yrs Male 515 Alpha St DAYTON, OH 45404 </div>									
<div> <div> Contacts </div> <div> <div> <div> Referral Number Contact Date Contact Method Contact Outcome Contact Details </div> <div> VA0000000718 02/11/2019 15:15 Phone Spoke with Veteran directly </div> </div> </div> </div>									
<div> <div> VA0000000718 02/11/2019 15:11 Phone </div> </div>									
<div> <div> Appointments </div> <div> <div> <div> Referral Number Community Provider / Facility Date Time Appointment for Treating Specialty Appointment Location Provider Name or Location Drive Time Affiliation Appointment Type Scheduling Method Status Notes Reason for Cancellation </div> <div> VA0000001044 Maine Coast Memorial 05/16/2019 14:00 Emergency evaluation and treatment for the referred condition and specified treatment date indicated on the consult Emergency Medicine Maine Coast Memorial - Coastal Health Center JOSEPH FIELD Outpatient Booked </div> </div> </div> </div>									
<div> <div> VA0000000714 Mercy Pain Center 04/30/2019 15:00 Initial outpatient evaluation for this episode of care Cardiovascular Disease (Cardiology) Mercy Pain Center Mercy Pain Center Outpatient Canceled Canceled by Patient </div> </div>									
<div> <div> VA0000000963 Miles Memorial Hospital - MMC 04/30/2019 15:00 Pre-operative medical and cardiac clearance as indicated, to include H-Pitabs, EKG, CXR - Cardiology - Cath/PCI Physical Therapist in Private Practice LincolnHealth Wellness and Rehab - MMC LincolnHealth Wellness and Rehab - MMC Outpatient Booked </div> </div>									
<div> <div> VA0000000714 Mercy Pain Center 04/10/2019 15:56 A maximum of twelve (12) acupuncture visits is approved for this episode of care. Approved services include acupuncture with or without electrostimulation. A maximum of one additional unit of acupuncture (with or without Cardiovascular Disease (Cardiology) Mercy Pain Center Mercy Pain Center Outpatient Booked </div> </div>									



NOTE: The **Change Status** screen can also be accessed by clicking the **Appointment For** link located on the referral row and then selecting **Change Status**, located beneath the **Appointment Status** field.

- The **Change Status To** field automatically populates as **Canceled**. If selecting a different status, click the **Magnifying Glass** icon in the **Change Status To** field and select a status from the drop-down list.



NOTE: If **No Show** is selected, the **Reason for No Show** field must be populated.

- Click the **Magnifying Glass** icon in the **Reason for Cancellation** field and select the appropriate reason for cancellation from the available options.
- Enter any additional information regarding the appointment cancellation.



NOTE: The **Free Text for Cancellation** field can be used for additional details regarding the appointment (e.g., spoke to Veteran's family member to cancel the appointment.)

Figure 23: Appointment Change Status Screen

HealthShare Referral Manager QA R23_USXK_ADRHOC3_B103 Training Community Provider

ONE Veteran 01/01/1900 119 Yrs Male 515 Alpha St DAYTON, OH 45404

Appointment Change Status

Change Status To: Canceled

*Reason for Cancellation: Canceled by Patient

Free Text Reason for Cancellation: Patient could not travel to appointment

Cancel Date: 06/13/2019

Cancel Time: 06:53

Reason for No Show:

HealthShare Referral Manager

Update


7. Click the **Update** button  at the bottom right of the screen to save changes.
8. The appointment status is now displayed as **Canceled**.

Figure24: Additional Referral Information Screen

ONE Veteran 01/01/1900 119 Yrs Male 515 Alpha St DAYTON, OH 45404

Contacts

Referral Number	Contact Date	Contact Method	Contact Outcome	Contact Details
VA0000000718	02/11/2019 15:15	Phone		Spoke with Veteran directly
VA0000000718	02/11/2019 15:11	Phone		


Appointments

Referral Number	Community Provider / Facility	Date	Time	Appointment for	Treating Specialty	Appointment Location	Provider Name or Location	Drive Time	Affiliation	Appointment Type	Scheduling Method	Status	Notes	Reason for Cancellation
VA0000001044	Maine Coast Memorial	05/15/2019	14:00	Emergency evaluation and treatment for the referred condition and specified treatment date indicated on the consult.	Emergency Medicine	Maine Coast Memorial - Coastal Health Center	JOSEPH FIELD			Outpatient		Canceled		Canceled by Community Provider
VA0000000714	Mercy Pain Center	04/30/2019	15:00	Initial outpatient evaluation for this episode of care.	Cardiovascular Disease (Cardiology)	Mercy Pain Center	Mercy Pain Center			Outpatient		Canceled		Canceled by Patient

4.8. Record Contact

HSRM enables users to record any contact made with the Veteran, a community provider, or other person or organization regarding the referral. Anyone with access to the referral can view this information.

To record contact about a referral:

1. Locate the referral (see the [Locate a Referral](#) section of this guide).
2. Select the referral from the **Referral List**.
3. Click the **Action Menu**  icon on the **Patient Banner**.

4. Select **Record Contact** from the drop-down menu. The **Record Contact** screen appears.

Figure 24: Action Menu - Record Contact

The screenshot shows the 'HealthShare Referral Manager' interface. At the top, there's a header with a 'Back to: Referral List' link and a user identifier 'HealthShare Referral Manager QA R23_U1500_ADRHOC3_B1803'. Below the header, patient information is displayed: 'ONE, Veteran', '01/01/1900', '119 Yrs', 'Male', and '515 Alpha St DAYTON, OH 45404'. The main area is divided into 'Referral Details' and a right-hand 'Action Menu'. The 'Referral Details' section includes fields for 'Referring Facility' (Canandaigua VA Medical Center), 'Referring Facility Phone' (505-394-2000), 'Referring Facility Fax' (505-393-8328), 'Referring Provider' (THAO TRAN), and 'Priority' (Routine). It also shows 'Provisional Diagnosis' (H91EX9 Other specified hearing loss, unspecified ear), 'Referral Date' (05/31/2019), 'Clinically Indicated Date' (05/31/2019), and 'Referral Expiration Date' (05/30/2020). The 'Action Menu' on the right contains options: 'Add Task', 'Patient Details', 'Additional Referral Information', 'Record Contact' (highlighted with a red box), and 'Requests for Services'.

5. Enter the relevant information regarding the contact and click the **Update** button at the bottom right of the screen to save changes.


Figure 25: Record Contact - Record Contact Screen

The screenshot shows the 'Record Contact' screen. At the top, there's a header with a 'Back to: Referral Details' link and a user identifier 'HealthShare Referral Manager QA R23_U1500_ADRHOC3_B1803'. Below the header, patient information is displayed: 'ONE, Veteran', '01/01/1900', '119 Yrs', 'Male', and '515 Alpha St DAYTON, OH 45404'. The main area is titled 'Record Contact' and contains a 'Contact' section with fields for 'Contact Method' (Phone), 'Contact Date' (06/13/2019), 'Contact Time' (13:08), 'Contact Status' (Completed), and 'Contact Outcome'. There are also fields for 'Indirect Time' and 'Interpreting Time'. Below these fields is a 'Contact Details' section with a large text area. At the bottom right, there is a green 'Update' button highlighted with a red box.

4.9. View Additional Referral Information

Users can view additional information about a referral on the **Additional Referral Information** screen. This screen displays **Contacts**, **Appointments**, **Referral Documents**, **Care Coordination Documents**, **Referral Notes**, and **Patient Letters**.

To view additional referral information:

1. Locate the referral (see the [Locate a Referral](#) section of this guide).
2. Click the **Action Menu**  icon to the right of the corresponding referral row and select **Additional Referral Information**.



NOTE: The **Action Menu** ... is also available from the **Referral Details** screen in the **Patient Banner**.

Figure 26: Referral List - Additional Referral Information

HealthShare Referral Manager QA R23_USXX_ADHOC4_B108										
Referral List										
> Referrals										
Referring Facility	Last Name	First Name	Date of Birth	SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Hematology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000718	HEMATOLOGY
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Newborn Care SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000712	NEWBORN CARE
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Lab and Pathology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000719	LAB AND PATHOLOGY
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Emergency/Urgent Care SEOC 1.0.2 PRCT	Routine		03/07/2019	VA0000000804	ER VISIT/URGENT CARE
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Allergy and Immunology SEOC 1.0.3 PRCT	Routine		05/31/2019	VA0000001171	ALLERGY AND IMMUNOLOGY
Canandaigua VA Medical Center	THREE	Veteran	01/01/1900	666010003	Cardiology - CathPCI SEOC 1.0.4	Routine		05/31/2019	VA0000001173	CARDIOLOGY TESTS, PROCEDURES, STUDIES

Add Task
Patient Details
Additional Referral Information
Record Contact
Requests for Services

- The **Additional Referral Information** screen appears, showing **Contacts**, **Appointments**, **Referral Documents**, **Care Coordination Documents**, **Referral Notes**, and **Patient Letters** related to the referral. Click on each to view the corresponding information.

Figure 27: Additional Referral Information

Back to: Referral List

HealthShare Referral Manager QA R21_USXX_ADHOC2_B52

Training Community Provider

ONE, Veteran

01/01/1900

119 Yrs

Male

000 MAPLE LANE

▼

Contacts

Referral Number

Contact Date

Contact Method

Contact Outcome

Contact Details

VA0000000718

02/11/2019 15:15

Phone

Spoke with Veteran directly

VA0000000718

02/11/2019 15:11

Phone

>

Appointments

Date, Treating Special

▼

Referral Documents

Document Type

Description

Date Created

Time Created

Last Update User

Last Update Facility

RefDoc Packet

RefDoc Packet

03/15/2019

11:44

Training FCC

Canandaigua VA Medical Center

Medical Documents

CT scan

03/14/2019

20:18

Training Community Provider

ACUTE & WELLNESS CHIROPRACTIC CLINIC

▼

Care Coordination Documents

Date Created

Description

Document Type

Date Created

Time Created

>

Referrals: Notes

Date, Time

>

Letters: Patient



NOTE: Each of the lists can be sorted using the **Column Header** and **Advanced** sorting methods.

4.10. Working with Tasks


A task in HSRM represents a discrete action that must be completed for a Veteran's referral. Tasks minimize administrative burdens and streamline communications. They enable VA and community providers to share information without having to pick up the phone. Automatic

tasks serve as reminders for submitting medical documents and precertification information, minimizing potential delays in payment.

For example, a community provider will receive an auto-generated task from VA to submit medical documentation seven days after the referral status is changed to **Initial Care Given**. Alternatively, the community provider can create a manual task to communicate with VA; for example, to request VA to contact the Veteran or to provide additional referral documents.

4.10.1. Create a Task

To manually create a task:

1. Locate the referral (see the [Locate a Referral](#) section of this guide).
2. Click the **Action Menu** icon  to the right of the corresponding referral row, then select **Add Task**.




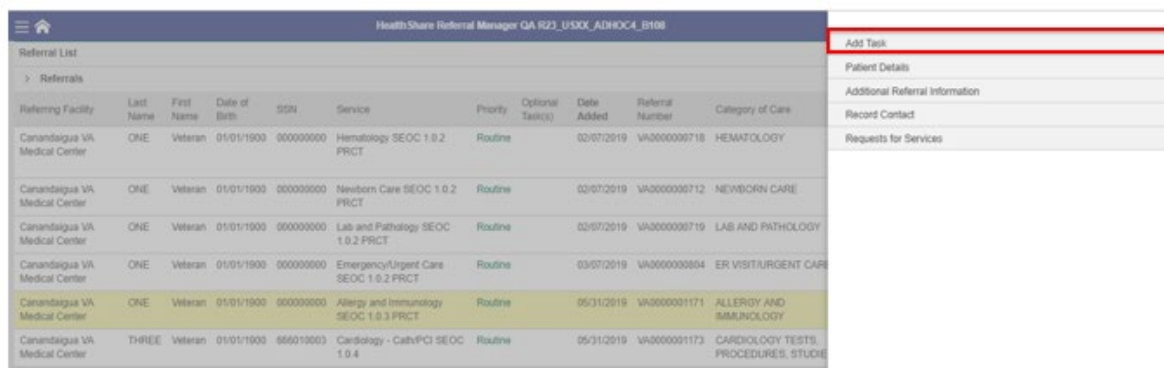
NOTE: The **Action Menu**  is also available from the **Referral Details** screen in the **Patient Banner**.

Figure 28: Action Menu - Edit Task



HealthShare Referral Manager QA R23_U50X_ADHOC4_B108										
Referral List										
> Referrals										
Referring Facility	Last Name	First Name	Date of Birth	SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Hematology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000718	HEMATOLOGY
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Neonatal Care SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000712	NEONATAL CARE
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Lab and Pathology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000719	LAB AND PATHOLOGY
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Emergency/Urgent Care SEOC 1.0.2 PRCT	Routine		03/07/2019	VA0000000804	ER VISIT/URGENT CARE
Canandaigua VA Medical Center	ONE	Veteran	01/01/1900	000000000	Allergy and Immunology SEOC 1.0.3 PRCT	Routine		05/11/2019	VA0000001171	ALLERGY AND IMMUNOLOGY
Canandaigua VA Medical Center	THREE	Veteran	01/01/1900	000010003	Cardiology - CathPCI SEOC 1.0.4	Routine		05/11/2019	VA0000001173	CARDIOLOGY TESTS, PROCEDURES, STUDIES

Add Task
 Patient Details
 Additional Referral Information
 Record Contact
 Requests for Services

3. The **Task Edit** screen appears. The **Patient Banner** is located at the top of the screen to show demographic information for the patient associated with the referral.
4. Enter the appropriate information (e.g., **Task Item**, **Priority**, **Status**, **Comments**) to create the task. **Task Item**, **Priority**, **Status**, **Due Date** and **Start Date** fields are mandatory (as denoted by the red asterisk) and can be edited.

Figure 29: Task Edit Screen

HealthShare Referral Manager QA R23_USDX_ADHOC3_B103 Training Community Provider

ONE, Veteran 01/01/1900 119 Yrs Male 515 Alpha St DAYTON, OH 45404

Task Edit

*Task Item Add Documentation, Community request to VA

*Priority Normal

*Status Pending

Assign Task to User

Assigned To User



Assign Task to Group

Assigned Facility Canandaigua VA Medical Center

Comments

HealthShare Referral Manager

Accept Task Update

5. Click the **Magnifying Glass** icon  within each field to view and select available options.
6. Click the **Update** button  at the bottom right to save the task information.

4.10.2. View or Edit a Task

The **Task List** displays all task items for the facility. From the **Task List**, an item can be reviewed and edited.

To view or edit a task:


1. Click the **Menu** icon  at the top left and select **Task List** from the drop-down options.

Figure 30: Menu - Task List

U.S. Department of Veterans Affairs

Search

Referral List

Task List

Reports

Tools

HealthShare Referral Manager QA R23_USDX_ADHOC3_B103 Training Community Provider

Priority Order Date Added

SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care	Status	Community Provider / Facility	Appt Date
900 000000000	Hematology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000718	HEMATOLOGY	First Appointment Made	ACUTE & WELLNESS CHIROPRACTIC CLINIC	03/13/2019
900 000000000	Newborn Care SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000712	NEWBORN CARE	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
900 000000000	Lab and Pathology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000719	LAB AND PATHOLOGY	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
900 000000000	Emergency/Urgent Care SEOC 1.0.2 PRCT	Routine		03/07/2019	VA0000000604	ER VISIT/URGENT CARE	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
900 000000000	Allergy and Immunology SEOC 1.0.3 PRCT	Routine		05/31/2019	VA0000001171	ALLERGY AND IMMUNOLOGY	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	
900 000010003	Cardiology - CathPCI SEOC 1.0.4	Routine		05/31/2019	VA0000001173	CARDIOLOGY TESTS, PROCEDURES, STUDIES	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	

2. Locate the task on the **Task List**.

- Click the task title in the **Task** column to navigate to the **Task Edit** screen (data in the **Task** and **Last Name** columns are displayed as hyperlinks). The **Task Edit** screen appears.



NOTE: Overdue tasks have a red indicator in the **Due Date** column.

Figure 31: Task List Screen

HealthShare Referral Manager QA R23_USXX_ADRHOC4_B106													
Task List													
Start Date	Due Date	Task	Task Status	Priority	Assigned User	Assigned Group	Assigned Facility	Category of Care	Last Name	First Name	Gender	Date of Birth	Completed
03/13/2019	03/13/2019	New Appointment Scheduled	Pending	Normal			ACUTE & WELLNESS CHIROPRACTIC CLINIC	HEMATOLOGY	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>
03/14/2019	03/14/2019	Message from VA to Community	Pending	Normal	Training Community Provider		ACUTE & WELLNESS CHIROPRACTIC CLINIC	CARDIOLOGY IMAGING	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>
03/21/2019	03/21/2019	Submit Medical Documents to VA	Pending	Normal	Training Community Provider		ACUTE & WELLNESS CHIROPRACTIC CLINIC	CARDIOLOGY IMAGING	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>

- Review the task, including any comments.
- Edit the **Priority** and **Status** fields as needed. To do this, click the **Magnifying Glass** icon within each field and select the appropriate option.
- Edit the **Comments** field.

Figure 32: Task Edit Screen

Back to: Task List

HealthShare Referral Manager QA R23_USXX_ADRHOC3_B103

Training Community Provider

ONE, Veteran
01/01/1900
119 Yrs
Male
515 Alpha ST DAYTON, OH 45404

Task Item: New Appointment Scheduled

Priority: Normal

Status: Pending

Due Date: 03/13/2019

Start Date: 03/13/2019

Assign Task to User:

Assigned To User:

Assign Task to Group:

Assigned Facility: ACUTE & WELLNESS CHIROPRACTIC CLINIC

Comments:
Please add documentation after providing the Diagnostic images as clinically required

HealthShare Referral Manager

Accept Task
Update

- Click the **Update** button at the bottom right to save the task information and go back to the **Task List**.

Figure 33: Task List

Start Date	Due Date	Task	Task Status	Priority	Assigned User	Assigned Group	Assigned Facility	Category of Care	Last Name	First Name	Gender	Date of Birth	Completed	Comments
03/13/2019	03/13/2019	New Appointment Scheduled	Pending	Normal			ACUTE & WELLNESS CHIROPRACTIC CLINIC	HEMATOLOGY	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	Please add documenta ...
03/14/2019	03/14/2019	Message from VA to Community	Pending	Normal	Training Community Provider		ACUTE & WELLNESS CHIROPRACTIC CLINIC	CARDIOLOGY IMAGING	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	I will submit the in ...
03/21/2019	03/21/2019	Submit Medical Documents to VA	Pending	Normal	Training Community Provider		ACUTE & WELLNESS CHIROPRACTIC CLINIC	CARDIOLOGY IMAGING	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	

- After editing the task, you can complete the task by selecting the task row to access the **Referral Details** screen.

Figure 34: Referral Details Screen

- When the task has been updated, you are able to mark the task as complete.

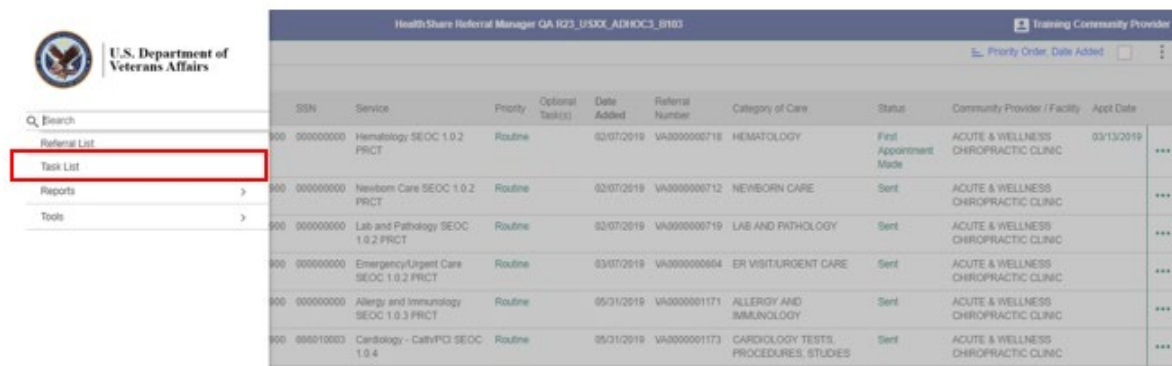
4.10.3. Mark a Task Complete

From the **Task List**, an item can be marked as complete.

To mark a task as complete:

- Click the **Menu** icon at the top left of any screen and select the **Task List** option.

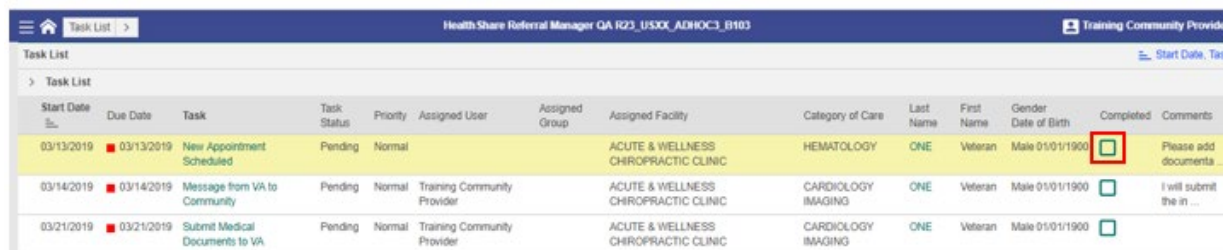
Figure 35: Menu - Task List



SSN	Service	Priority	Optional Task(s)	Date Added	Referral Number	Category of Care	Status	Community Provider / Facility	Appt Date
900 000000000	Hematology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000718	HEMATOLOGY	First Appointment Made	ACUTE & WELLNESS CHIROPRACTIC CLINIC	03/13/2019
900 000000000	Newborn Care SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000712	NEWBORN CARE	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	03/13/2019
900 000000000	Lab and Pathology SEOC 1.0.2 PRCT	Routine		02/07/2019	VA0000000719	LAB AND PATHOLOGY	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	03/13/2019
900 000000000	Emergency/Urgent Care SEOC 1.0.3 PRCT	Routine		03/07/2019	VA0000000664	ER VISIT/URGENT CARE	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	03/13/2019
900 000000000	Allergy and Immunology SEOC 1.0.3 PRCT	Routine		05/31/2019	VA0000001171	ALLERGY AND IMMUNOLOGY	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	03/13/2019
900 888010003	Cardiology - CathPCI SEOC 1.0.4	Routine		05/31/2019	VA0000001173	CARDIOLOGY TESTS, PROCEDURES, STUDIES	Sent	ACUTE & WELLNESS CHIROPRACTIC CLINIC	03/13/2019



2. Locate the task on the **Task List**.
3. Check the box in the **Completed** column of the task.

Figure 36: Task List Screen



Start Date	Due Date	Task	Task Status	Priority	Assigned User	Assigned Group	Assigned Facility	Category of Care	Last Name	First Name	Gender	Date of Birth	Completed	Comments
03/13/2019	03/13/2019	New Appointment Scheduled	Pending	Normal			ACUTE & WELLNESS CHIROPRACTIC CLINIC	HEMATOLOGY	ONE	Veteran	Male	01/01/1900	<input checked="" type="checkbox"/>	Please add documents ...
03/14/2019	03/14/2019	Message from VA to Community	Pending	Normal	Training Community Provider		ACUTE & WELLNESS CHIROPRACTIC CLINIC	CARDIOLOGY IMAGING	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	I will submit the in ...
03/21/2019	03/21/2019	Submit Medical Documents to VA	Pending	Normal	Training Community Provider		ACUTE & WELLNESS CHIROPRACTIC CLINIC	CARDIOLOGY IMAGING	ONE	Veteran	Male	01/01/1900	<input type="checkbox"/>	

4.11. Canned Text

Canned text automatically populates text fields with predefined text items. Clicking the **Canned Text** icon  will display existing items in the canned text library. Users can create their own canned text to populate any text field that contains the **Canned Text** icon .

To create canned text:

1. Locate the referral (see the [Locate a Referral](#) section of this guide).
2. Navigate to the **Referral Processing Information** section. In the **Comments** box, enter the text you wish to save, highlight it, and click the **Plus** icon. This will take you to the **Canned Text** screen.
3. On the **Canned Text** screen, enter a code you wish to assign to the text. Click the **Update** button at the bottom right to save the canned text.

4.12. Generate Reports

HSRM can generate reports that display the types of services that are referred to a specific community provider/facility, as well as the current status of the referrals sent during the selected period.

Table 1: HSRM Report Types

Report Type	Description	Users Allowed to Run Report
Community Provider Referral Summary Report	This report allows VA staff and community providers to generate a tailored list of referrals that have been sent to a community provider or facility. This provides community providers with a list of referrals received from VA during a specified period.	<ul style="list-style-type: none">• VA Facility Community Care Staff• Community Providers
Download Request for Services Form	This paper RFS form can be submitted until the electronic RFS form is available and may be uploaded into HealthShare Referral Manager.	<ul style="list-style-type: none">• VA Facility Community Care Staff• Community Providers
HSRM Reports Reference Guide	This report provides VA staff and community providers with the definitions and uses of all reports that they have access to.	<ul style="list-style-type: none">• VA Facility Community Care Staff• Community Providers
Veterans Appointment Report	Displays all the appointments at a specified VA or community provider facility. Report fields include the appointment date, appointment status, level of care coordination, as well as referral details.	<ul style="list-style-type: none">• VA Facility Community Care Staff• Community Providers

To run a report:


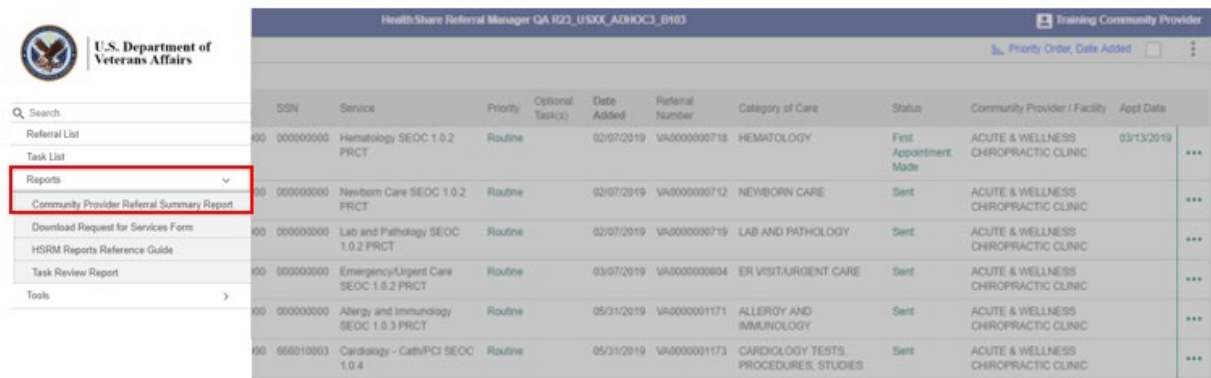
1. Click the **Menu** icon , select **Reports**, and choose **Community Provider Referral Summary Report**.

Figure 37: Menu - Community Provider Referral Summary Report



NOTE: The **HSRM Reports Reference Guide** option, located in **Reports**, provides directions and detailed information about the report.

2. Select the criteria needed to run the desired report from the fields available and click the **Preview** icon to run the report.

Figure 38: Community Provider Referral Summary Report Parameters

3. Navigate to the report. Reports may generate in PDF format or as Excel documents and can be saved or printed.



NOTE: To print the report from Chrome, click the **Print** icon at the top right of the report. To print from Internet Explorer, click the **Print File** icon at the bottom of the report.

4.13. Billing and Other Referral Information

The **Billing and Other Referral Information** sheet provides community providers with additional details related to the legal authority, claims submissions instructions, precertification requirements, and provision of prescriptions and durable medical equipment for the referral. The information sheet also contains links to other community provider resources, including the Community Provider Toolkit, the precertification website, the electronic data interchange (EDI) claims submission clearinghouse, and the Vendor Inquiry System (status of claims). Community providers can access this information sheet directly from

the **Referral Details** screen. The information is also available on the **Offline Referral Form**. The information sheet will contain appropriate content based on the program authority. For example, a referral authorized as a Veterans Care Agreement, Community Care Network referral, or 1728 service-connected emergency care referral would contain content specific to that program.

To access the **Billing and Other Referral Information** sheet:


1. Locate the referral (see the [Locate a Referral](#) section of this guide).
2. From the **Referral Details** screen, click the **Component Menu** icon  at the far right of the **Referral Details** section (below the **Patient Banner**), then select **Billing and Other Referral Information**.


Figure 39: Component Menu - Billing and Other Referral Information



The screenshot displays the 'Referral Details' screen in the HealthShare Referral Manager. The interface includes a header with a 'Back to: Referral List' link and a patient banner for 'ONE, Veteran' with details like DOB (01/01/1900), T19 Yrs, Male, and address (515 Alpha St DAYTON, OH 45404). The 'Referral Details' section contains fields for Referring Facility (Canandaigua VA Medical Center), Referring Facility Phone (585-394-2000), Referring Facility Fax (585-393-8328), Referring Provider (THAO TRAN), Priority (Routine), Provisional Diagnosis (H915X9 Other specified hearing loss, unspecified ear), Referral Date (05/31/2019), Clinically Indicated Date (05/31/2019), and Referral Expiration Date (05/30/2020). On the right, a 'Referral Details' sidebar shows a 'Print' button, a dropdown menu, and a list of options: 'Offline Referral Form', 'Billing and Other Referral Information' (highlighted with a red box), and 'Options'.

3. The **Billing and Other Referral Information** sheet appears in a new browser tab and can be printed, downloaded, and saved as a PDF file.

Figure 40: Component Menu - Billing and Other Referral Information Sheet

Billing and Other Referral Information	VA0000000804	Page 1 of 1
Billing and Other Referral Information	VA 	U.S. Department of Veterans Affairs
Referral Number: VA0000000804 Referring VA Facility: Canandaigua VA Medical Center		
Any claim related to this episode of care MUST INCLUDE THE APPROVED REFERRAL NUMBER as the Referral Number or Prior Authorization Number.		
Billing Remarks This approved referral was authorized under Title 38 U.S.C. 1725, Veterans Millennium Healthcare and Benefits Act. VA payment will be the lesser of the amount for which the Veteran is personally liable or 70 percent of the applicable Medicare fee schedule amount, excluding copayment, cost share or deductible associated with their OHI. VA is prohibited from reimbursing Veteran OHI member liabilities such as copayments, cost shares or deductibles. For complete information about VHA's billing requirements, please visit https://www.va.gov/COMMUNITYCARE/providers/info_claimFiling.asp and follow the instructions on the site.		
Status of Claims To check on the status of your claims, please visit https://www.vis.fsc.va.gov/ and follow the instructions on the site.		

5. Additional Resources

Contact the HSRM Help Desk for support. Open a ticket by phone at 1-844-293-2272 (TTY: 1-512-326-6638) or email HSRMSupport@va.gov.

Additionally, the following websites provide quick and easy access to commonly needed materials:

- [VA Community Care Website](#)
- [Billing Fact Sheet for VA Community Care Programs](#)
- [Vendor Inquiry System Fact Sheet](#)
- [Vendor Inquiry System](#)

Appendix A: Acronyms and Abbreviations

Table 2: Acronyms and Abbreviations

Acronym or Abbreviation	Definition
Admin	Administrator
CAR	Claims Adjudication and Reimbursement
CBOC	Community-Based Outpatient Clinic
CCN	Community Care Network
CCP	Community Care Provider
CPAC	Consolidated Patient Account Center
CPRS	Computerized Patient Records System
EOC	Episode of Care
ESD	Enterprise Service Desk
GEC	Geriatrics and Extended Care
HSRM	HealthShare Referral Manager
IT	Information Technology
IV	Insurance Verification
JAWS	Job Access With Speech
NVDA	Nonvisual Desktop Access
OHI	Other Health Insurance
OS	Operating System
PDF	Portable Document Format
PPMS	Provider Profile Management System
RUR	Revenue Utilization Review
SAR	Secondary Authorization Request
SEOC	Standardized Episode of Care
TPA	Third-Party Administrator
VA	U.S. Department of Veterans Affairs

Acronym or Abbreviation	Definition
VAMC	Veterans Affairs Medical Center
VCA	Veterans Care Agreement
VistA	Veterans Health Information Systems and Technology Architecture
VISN	Veterans Integrated Service Network